

# Open House Alert

## What Is an Open House Alert?

An **Open House** is a scheduled event where a property is made available for prospective buyers or tenants to visit and view in person.

The **Open House Alert** feature allows you to automatically notify leads about upcoming open houses that match their preferences. Alerts can be configured based on criteria such as city, property type, price range, open house date, bedrooms, bathrooms, and more.

You can choose the alert frequency and assign alerts to leads, tags, stages, or sources. Once configured, email alerts will be sent whenever matching open house listings become available.

## Access Open House Alerts

1. From the left-hand menu, click **Alerts**.
  2. Select **Open House Alerts**.
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## Create an Open House Alert

1. Click the + **Add New Open House Alert** button.
2. Complete the required fields:
  - Alert Name
  - Area or City
  - Property Category
  - Building Type
  - Building Style
  - Property Status
  - Basement Type
  - Garage Spaces
  - Square Footage
  - Days on Market
  - Open On Date
  - Alert Frequency
  - Number of Properties to Include
  - Bedroom Requirements
  - Bathroom Requirements
  - Price Range
3. Click **Create Alert**.

The Open House Alert will be created successfully.

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## Edit an Open House Alert

1. Navigate to **Open House Alerts**.
2. Locate the alert you want to modify.
3. Click **Edit**.
4. Update the required fields.
5. Click **Update Alert**.

The alert will be updated successfully.

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## View Leads Assigned to an Open House Alert

1. Navigate to **Open House Alerts**.
2. Locate the desired alert.

The number of assigned leads is displayed under the alert.

## View Active Leads

1. Click the number displayed in the **Active** column.

The list of active leads assigned to the alert will be displayed.

2. Select one or more leads, or use **Select All**.
3. Choose one of the following actions:
  - **Pause** - Temporarily stop sending the alert to the selected leads.
  - **Delete** - Remove the alert from the selected leads.

## View Paused Leads

1. Click the number displayed in the **Paused** column.

The list of paused leads assigned to the alert will be displayed.

2. Select one or more leads, or use **Select All**.
3. Choose one of the following actions:
  - **Resume** - Reactivate the alert for the selected leads.
  - **Delete** - Remove the alert from the selected leads.

## Manage Open House Alert Status from a Lead Profile

You can also pause or resume an Open House Alert directly from a lead profile.

1. Navigate to **CRM**.

2. Open the desired lead profile.
3. Locate the **Open House Alerts** section.
4. Find the alert you want to manage.

## Pause an Open House Alert

1. Click **Pause** next to the alert.
2. A confirmation message will appear.
3. Click **Confirm**.

The alert will be paused successfully, and no further Open House Alert emails will be sent until it is resumed.

## Resume an Open House Alert

1. Click **Resume** next to the paused alert.
2. A confirmation message will appear.
3. Click **Confirm**.

The alert will be reactivated successfully, and matching Open House Alert emails will continue to be sent to the lead.

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## Assign an Open House Alert

Open House Alerts can be assigned from the Alerts page, CRM page, or a Lead Profile.

### Assign from the Alerts Page

1. Navigate to **Open House Alerts**.
2. Select the desired alert.

### Assign to Leads

1. Click **Leads** from the top menu.
2. Select one or more leads.
3. Click **Submit**.

### Assign to Tags

1. Click **Tags** from the top menu.
2. Select one or more tags.
3. Click **Apply**.

The alert will be assigned to all leads associated with the selected tags.

### Assign to Stages

1. Click **Stages** from the top menu.
2. Select one or more stages.
3. Click **Apply**.

The alert will be assigned to all leads associated with the selected stages.

## Assign to Sources

1. Click **Sources** from the top menu.
2. Select one or more sources.
3. Click **Apply**.

The alert will be assigned to all leads associated with the selected sources.

## Assign from the CRM Page

1. Navigate to **CRM**.
2. Select one or more leads.
3. Click **More** from the top menu.
4. Click **Open House Alert**.
5. Select the desired Open House Alert.
6. Save the assignment.

## Assign from a Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead profile.
3. Locate the **Open House Alerts** section.
4. Click **Add**.
5. Select the desired Open House Alert.
6. Click **Submit**.

The alert will be assigned successfully.

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**Note:** Alerts assigned to one or more leads cannot be deleted. Remove the alert from all associated leads before attempting to delete it.

## Delete from the Alerts Page

1. Navigate to **Open House Alerts**.

2. Select the alert you want to delete.
3. Click **Delete** from the top menu.
4. Confirm the deletion.

## Delete from a Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead profile.
3. Locate the **Open House Alerts** section.
4. Click **Delete** next to the alert you want to remove.
5. Confirm the action.

The Open House Alert will be removed successfully from the selected lead.

**Note:** This action only removes the alert assignment from the lead profile. The Open House Alert itself will remain available in the CRM. To permanently delete an Open House Alert, it must be removed from all assigned leads and then deleted from the **Open House Alerts** page.

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## Alert Execution

Open House Alerts are processed automatically each day between **9:00 AM and 10:00 AM**.

Matching open house listings will be sent to assigned leads according to the selected frequency.

## Important Notes

- If a lead does not open up to 10 consecutive alert emails, the alert will automatically stop sending to that lead. This helps protect email deliverability and reduces the likelihood of emails being marked as spam.
- Alerts assigned to leads cannot be deleted until they have been removed from all associated leads.

You have successfully learned how to manage Open House Alerts in AgentRoof CRM.

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Revision #5

Created 2026-06-01 14:55:39 UTC by AgentRoof

Updated 2026-06-18 04:38:26 UTC by AgentRoof